

Large Scale Technologies and the CDE Model
Human Systems Dynamics Institute
October 2004

OPEN SPACE

Level	CONTAINING	DIFFERENTIATING	EXCHANGES
Individual	<ul style="list-style-type: none"> - Follow passion and take personal responsibility - Tight coupling between talk and action - Relevance to the topic - Invitation is what invites the individual - *Strongest container is the passion 	<ul style="list-style-type: none"> - Law of 2 feet - Topics identified by participants - Create bumblebees that cross- pollinate - All are equal in the circle and the event - Can say “no” to a request by another 	<ul style="list-style-type: none"> - Speaking and listening - Putting in my questions - Bumble bee and butterfly effects - Notes from each group - Evening News when whole group shares insights - Individual responsibility and self-management
Group	<ul style="list-style-type: none"> - Agenda topics and convening - No specific agenda - “Right time and right topic” are key: if too big or vague, will lack focus; if too narrow, not get creative - Momentum of self organizing 	<ul style="list-style-type: none"> - Groups by times and places - Interest in the question - Whoever shows up are the right people - Accomodates special interest groups that gather around like-kind issues 	<ul style="list-style-type: none"> - Market place news - Law of 2 feet - Evening News
Whole	<ul style="list-style-type: none"> - Topic of concern - Facilitator opens the space - Circle coming into the room - 4 principles negate the old container: <ol style="list-style-type: none"> 1. Whoever comes are the right people 2. Whatever happens is the only thing that could have 3. Whenever it starts is the right time 4. When it is over, it is over - - Conflict does not have to be managed - Boundaries open to surprise - No limit in size - Start with circle and end with news - Bulletin Board is blank to create issues that become agendas 	<ul style="list-style-type: none"> - Who is who, power and title - Passion and responsibility - Named difference rather than the emergent questions - There is no authority (no Design Team) - There is no one calling question - Not enough time for convergence - Will have complexity and diversity in the room - Potential for conflicts - Topics are richer than if done by a Design Team 	<ul style="list-style-type: none"> - Old exchange patterns (how conflict is managed) - Works well in situations of conflict or divergent interests - Butterfly/bumble bee - Opening or evening news for whole - Open space provides opportunities for both reflection and sharing - Proceedings covering the work of the groups is published for the last day
Negates	<ul style="list-style-type: none"> - Principles negate old containers of time movement, expectations, politeness - Destroys old patterns 	<ul style="list-style-type: none"> - Who is who - Power and title - “Right answer” - No authority - Open Space is a “difference intervention” 	<ul style="list-style-type: none"> - How conflict is managed

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WHOLE SYSTEMS CHANGE

LEVEL	CONTAINING	DIFFERENTIATING	EXCHANGES
Individual	<ul style="list-style-type: none"> - Want to find ways to improve situation - Individuals are cautious about sharing their perspective until they trust the table. 	<ul style="list-style-type: none"> - Individuals learn a lot and then through observation begin to trust leadership 	<ul style="list-style-type: none"> - Each person's truth is their truth and is heard - Works until there is commitment - Develop a common understanding of the situation the group is in - Each person eventually takes on role of facilitator or recorder/reporter - Each person is a carrier of part of the picture - Exchanges fill in the picture
Group	<ul style="list-style-type: none"> - Leaders act as containers in aligning the system to the future - Leaders determine how much of their power and control will be entrusted to others - Leaders establish expected outcomes and then become equal participants in the system - Design Team is a microcosm of the whole to be accessed by consultants for knowledge of the whole system - Design Team identifies readiness of system for change - Design Team spends most of the time structuring an agenda that will accomplish the outcomes (rather than who should be in the room) - Strong role of the Design Team permeates the event - Each table is a microcosm of the whole allowing for contact outside the normal system - Focus is on alignment 	<ul style="list-style-type: none"> - New and unexpected leadership evolves. - Acknowledged experts from outside the system come in with additional data - Structured activities stay open for burps in the system - Emotionally heavy by playing on disparity between dissatisfaction and vision 	<ul style="list-style-type: none"> - Highly structured by Design Team - Design follows DVF>R - Convergence built in - Careful crafting of work instructions - Most work done at MaxMix tables with reporting out for assimilation - Groups ask other groups to start or stop doing something that results in a benefit to the whole - Variable sequence of activities plus standard modules - Leadership diffused as participants in whole system - Alignment between power and relationships - Reporting informs the whole system of what is emerging

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WHOLE SYSTEMS CHANGE (continued)

LEVEL	CONTAINING	DIFFERENTIATING	EXCHANGES
Whole	<ul style="list-style-type: none"> - Format custom designed to the issue - No limit to number of participants - Three days are designed to create new container - Builds organizational identity - Established “outcome” becomes a container - Creates permeable boundaries 	<ul style="list-style-type: none"> - Unfreezes the whole - Number of stakeholders does not have to be equal/balanced - Pulls out the differences that make a difference - Clue for design change is when facilitator is surprised by shift in exchange - Dissatisfaction becomes open and felt 	<ul style="list-style-type: none"> - MaxMix tables change the exchanges - People come out of silos - Creating exchanges where there were none - Report out informs the whole of what’s emerged - Outcome is the unspoken container - First steps continue action - Panelists, experts and leaders give info to the whole - First Steps are first exchange of new environment and set of new pattern -
Negates	<ul style="list-style-type: none"> - Trickle down effect of change - Facilitator and DT control the process but not the outcomes 	<ul style="list-style-type: none"> - Information can be held by the whole system rather than just power 	<ul style="list-style-type: none"> - Whole Systems Change is about alignment through exchanges. - Container and Differences stay constant in order to move the exchanges.

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APPRECIATIVE INQUIRY

LEVEL	CONTAINING	DIFFERENTIATING	EXCHANGES
Individual	<ul style="list-style-type: none"> - Individual interviews lead up to and create the agenda - Shared stories and experiences - Individual relationships make a difference - Data is in the mind of the beholder (tell me a story about a time when..) - Personal story of the individual brings the context of what is “here and now” - Every person has had successes even in the worst of situations - “We make up our world by conversations. Shift the Conversation and change the world” Timothy 	<ul style="list-style-type: none"> - Focus is on the strengths that bind within social construction view: what we create, we will make happen - Can disburse beyond the event (interviews) - Individual experiences make the difference 	<ul style="list-style-type: none"> - Understand conflict but continue with the work - Anyone who wants to engage can (through interviews) - Stories lead to an emotional connection - Individual interviews
Group	<ul style="list-style-type: none"> - Flexible design - Begins with an interview “pair” and then moves to larger groupings for further work - Don’t need to have all of the participants attending the conference 	<ul style="list-style-type: none"> - The dream and design that emerge reflect the differences that make a difference in the collected stories and relationships. - Groups start out 1:1 and then develop into a larger community - Pairing is the foundation for the building of relationships throughout the process. 	<ul style="list-style-type: none"> - 1:1 interviews begin building the community - Smaller group work to discover common themes which amplifies hope - Hope becomes the exchange that moves the work beyond the meeting.
Whole	<ul style="list-style-type: none"> - Unlimited number of attendees - Five Design Principles: Discover, Dream, Design, Develop - Minimal planning for first steps - Unbounded container in order to expand and explore - Social Constructionism and emergence are conceptual containers - Dreams are a container - Data uncovered via stories - Focus on success and positive - Considered “asset building” in the not-for-profit world 	<ul style="list-style-type: none"> - Strengths make a difference - Emphasis is on relationships and strengths - Not much convergence: look at the many similarities (negates differences) - 	<ul style="list-style-type: none"> - Exchanges on individual level begin to transform the whole - Converge on passion - Voting with dots for what is significant and has energy
Negates	<ul style="list-style-type: none"> - Reaches beyond the event (interviews without a facilitator) - If problem oriented, finds the problems 	<ul style="list-style-type: none"> - Solving an old mental model by building a new one based on affirmation 	<ul style="list-style-type: none"> - AI is an exchange intervention by tapping into other’s passion to solve problems of being different.

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FUTURE SEARCH

LEVEL	CONTAINING	DIFFERENTIATING	EXCHANGES
Individual	<ul style="list-style-type: none"> - Lots of self management - Articulate your own history and hopes for future and share with group 	<ul style="list-style-type: none"> - Every stakeholder is in equal representation - There are no experts - Main distinction is past, present, future. 	<ul style="list-style-type: none"> - Prouds and Sorrys each individual needs to own their own stuff and how it contributes to the whole scenario
Group	<ul style="list-style-type: none"> - Work is to create scenarios - Lots of small and large group “discussion” (vs reporting out) - Design Team spends time figuring out who should come (more than what the agenda should be) - Stakeholders are balanced within the group 	<ul style="list-style-type: none"> - Recognizes individual role and stakeholder accountability 	<ul style="list-style-type: none"> - Do mind map to choose what is important and pull out the differences that will make a difference - Clarifies the differences between stakeholders - Timeline provides multiple levels of integration - Notes from other tables typed and distributed - Design Team meets before, during and after
Whole	<ul style="list-style-type: none"> - Specific agenda: past, present, future - Limited to 35-90 participants - Shareholders participate in equal numbers - MaxMix is in the room and therefore in all tables and groups - Convergence built in with search for common ground - Not whole system participation—by invitation only - Past creates a common container for whole room (search for what is similar) 	<ul style="list-style-type: none"> - Minimizes differences; focuses on common ground - Action plans distinguish future work to be done and teams to do it - Convening issue may be different - Focuses on common ground 	<ul style="list-style-type: none"> - Prescribed activities build on one another leading toward chaos - Focus is on discovery and alignment - Work that continues is done in context of larger environment - Stakeholders become accountable for their part in the problem
Negates	<ul style="list-style-type: none"> - Not intended to work the conflict but will acknowledge - No experts or speakers 	<ul style="list-style-type: none"> - Not a problem solving conference 	<ul style="list-style-type: none"> - Need for power and authority to affect the decisions

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KEY LEARNINGS

1. We are so accustomed to exchange interventions that we try to turn everything into an exchange. When Future Search becomes an exchange intervention rather than moving toward a shared container of common ground, it loses power. When Open Space becomes an exchange intervention rather than an articulation of differences in passion and responsibility, it loses power.
2. We, as practitioners need to learn to work CDE at each level and design the interventions that maximize the whole impact.
3. If don't have the full time, then the full impact will not occur.
4. Everyone wants to be a contributor.
5. The container has the capacity to either bind or loosen anxiety.
6. Individuals will organize their own experience to support their ability to move to another level
7. The CDE model supports the OD value of participation by acknowledging the inter-dependencies of differences.
8. Turning point is when language shifts from "me" to "we"

SIMPLE RULES

1. Look for the groupings and sub-groupings
2. Look for the pattern that falls within each grouping
3. Identify the key patterns that need to be broken for the system to move
4. Start with the easiest path

WHY FOLLOW UP DOES NOT WORK

1. Actions need to be aligned with the organizations mission and direction
2. Solutions need to maximize limited resources.
3. Cannot change the system by an exchange intervention: need to also touch the containing and differentiating.
4. Need to have a formal system for follow up work
5. Participants need to understand the deeper actions at play rather than the fact that they participated for a short time in creating a shift in the container.
6. Follow-up teams need to be built with authority to carry on the work of digesting data and keeping actions in front of the group
7. Information flow is critical to keep people connected to the emotional moment of the event
8. Keeping the plan simple and flexible
9. Focus on the differences that make a difference and ensure they are cost effective with high impact.
10. Need feedback loops that are always testing the movement of the system
11. Communicate results and what is happening that is positive—all the time!
12. Plan for ways to reconnect in with the emotion of the event

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